

The Interactive Model of Program Planning

Rosemary Caffarella's interactive model of program planning provides an interesting approach to creating a model for planning programs. With no particular beginning or ending, it places the decision making process within the hands of a person responsible for planning programs for adults. It is shown below as Figure 2.1, p. 21 from her book [Caffarella, R. S. (2002). *Planning programs for adult learners: A practical guide for educators, trainers, and staff developers* (2nd Ed.). San Francisco: Jossey-Bass.]. Exhibit 2.1, pp. 23-24, is included as a helpful supplement that provides various items or actions to consider when developing programs.

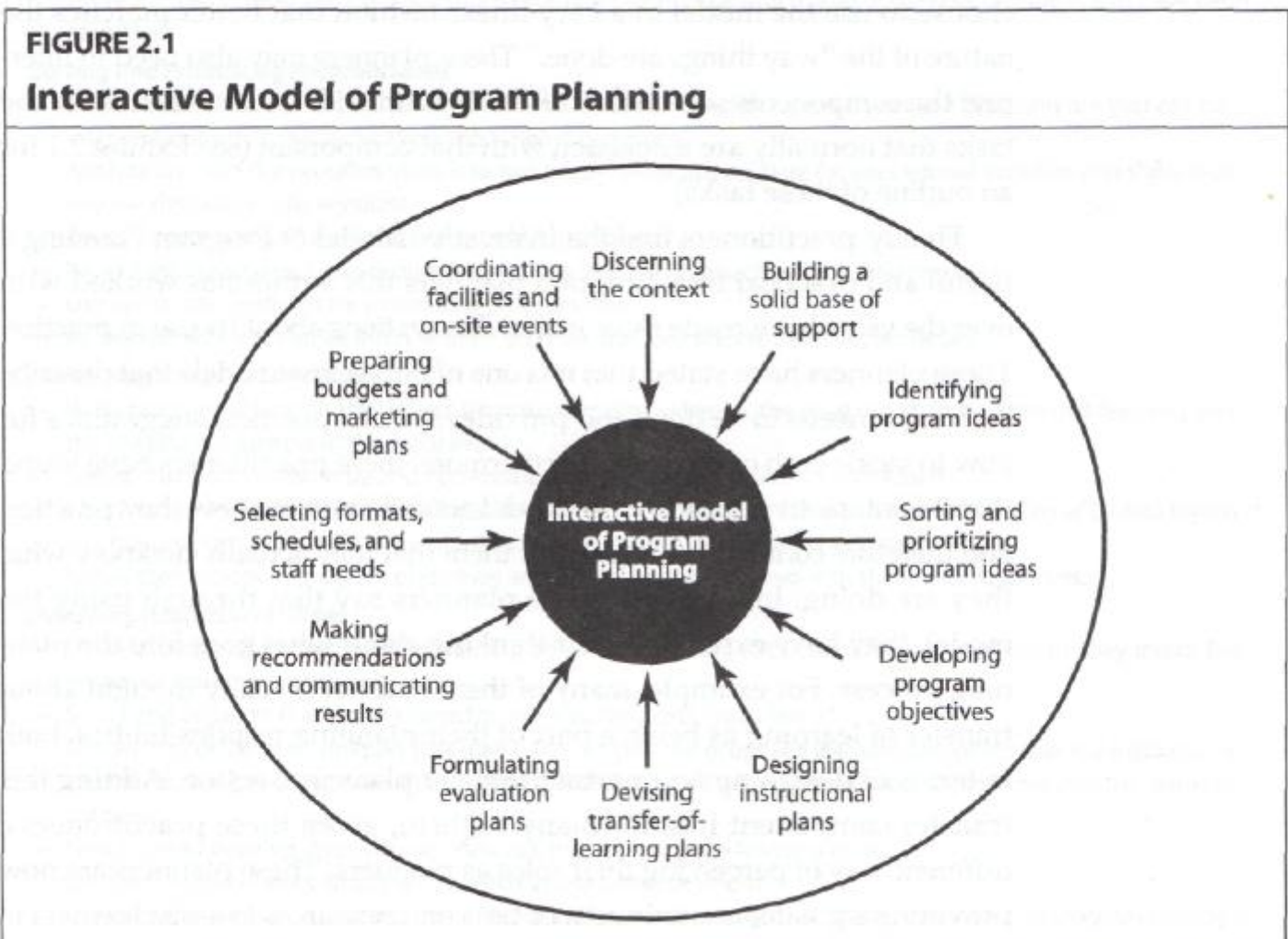


EXHIBIT 2.1

A Checklist for Planning Programs

Discerning the Context

- Be knowledgeable about the people, the organization, and the wider environmental contextual factors.
- Be well-informed about the issue of power dynamics in planning.
- Cultivate and/or enhance negotiation skills required to navigate situations in which power is a central issue.
- Ensure that beliefs and actions being displayed in one's practice are ethical.
- Know and be able to access sources of information about the context of planning situations.

Building a Solid Base of Support

- Ensure support from key constituent groups and other stakeholders.
- Cultivate continuous organizational support by establishing structural processes that work.
- Promote an organizational culture in which formal, job-embedded, and self-directed learning activities and continuous learning are valued.
- Obtain and maintain support from the wider community through formal and ad hoc groups and boards.
- Build and sustain collaborative partnerships with other organizations and groups.

Identifying Program Ideas

- Decide what sources to use in identifying ideas for education and training programs.
- Generate ideas through a variety of techniques.
- Be aware that highly structured needs assessments are not the only way to identify ideas for education and training programs.
- Ensure you can defend why a highly structured needs assessment is warranted, and choose and/or develop a model for conducting this assessment that is appropriate to the situation.
- Consider contextual issues that are or might effect how ideas for programs are generated.
- Be aware that in most planning situations program planners cannot use all of the program ideas that have been identified.

Sorting and Prioritizing Program Ideas

- Be knowledgeable about how priority ideas are defined, and what typical issues and problems are that call for interventions other than education and training programs.
- Analyze and sort the program ideas into two piles—those appropriate for educational activities and those that require alternative interventions.
- Select people who will do the actual prioritizing process.
- Be well-informed about two qualitative and quantitative approaches for prioritizing ideas.
- Use systematic methods for prioritizing program ideas.
- Be familiar with alternative interventions and how they are selected and implemented.

Developing Program Objectives

- Write program objectives that reflect what participants will learn, the resulting changes from that learning, and the operational aspects of the program.
- Ensure that both measurable and non-measurable program outcomes are included.
- Check to see whether the program objectives are written clearly so they can be understood by all parties involved.
- Use the program objectives as an internal consistency and "do-ability" checkpoint.
- Negotiate changes in program objectives among the parties involved with the planning process.

Designing Instructional Plans

- Develop clear and understandable learning objectives for each instructional session and ensure they match the proposed learning outcomes.
- Select and organize the content based on what participants "must learn."
- Choose instructional techniques that match the focus of the proposed learning outcomes, that the instructor is capable of using, and that take into account the backgrounds and experiences of the learners and the learning context.
- Select and/or develop instructional resources that enhance the learning effort.
- Choose an assessment component for each instructional segment.
- Use instructional assessment data in formative and summative ways for both instructional and program evaluation.
- Prepare clear and concise instructional plans.
- Make the instructional process work by ensuring instructors are competent and caring.

Devising Transfer-of-Learning Plans

- Be knowledgeable about the major factors that influence transfer of learning.
- Decide whether transfer-of-learning strategies should be employed before, during, and/or after a program.
- Determine the key players who should be a part of the transfer-of-learning process.
- Teach learners, supervisors, and other interested parties about transfer-of-learning strategies and techniques.
- Choose transfer strategies that are the most useful in assisting participants to apply what they have learned.
- Select and/or assist learners and others to opt for transfer-of-learning techniques that are the most useful to them in applying what they have learned.
- Negotiate and change the content, skills, and/or beliefs that are to be transferred.

Formulating Evaluation Plans

- Develop, as warranted, systematic program evaluation procedures.
- Use informal and unplanned evaluation opportunities to collect formative and summative evaluation data.
- Specify the evaluation approach or approaches to be used.
- Determine how evaluation data are to be collected.
- Think through how the data are to be analyzed.
- Describe how judgments are made about the program.

Making Recommendations and Communicating Results

- Examine program successes and failures, and formulate program recommendations.
- Tell the story well through carefully crafted program reports.
- Select the format for the report.
- Time the release of the report when the audience is most likely to review it.
- Follow up with appropriate individuals and groups.

Selecting Formats, Schedules, and Staff Needs

- Choose the most appropriate format or combination of formats for the learning activity.
- Take into account the desire to build a community of learners.
- Devise a program schedule.
- Identify staff requirements.
- Determine whether internal staff and/or whether external consultants are required.
- Make careful choices about instructors and/or learning facilitators.

Preparing Budgets and Marketing Plans

- Estimate the expenses for the program, including costs for the development, delivery, and evaluation of the program.
- Determine how the program is financed, and estimate the program income.
- Manage the program budget, and keep accurate budget records.
- Develop contingency budget plans for programs that are scaled back or cancelled.
- Be able to pay the bills for the program by managing the income side of the budget.
- Build and maintain program credibility, success, and market niches when marketing programs.
- Conduct a target audience analysis.
- Use already existing data or generate contextual information to help frame the marketing plan.
- Select and prepare promotional materials for the program.
- Prepare a targeted and lively promotional campaign.
- Ascertain and strengthen your promotional assets and capabilities.

Coordinating Facilities and On-Site Events

- Obtain suitable facilities, and arrange for instructional materials and equipment.
- Make sure facilities meet all Americans with Disabilities Act (ADA) requirements.
- Oversee all of the on-site program arrangements.
- Create a positive climate for learning from the moment the participants arrive.
- Provide systems for monitoring programs.
- Gather data for program evaluations.
- Give recognition to program participants, and thank both staff members and participants for being a part of the program.
- Tie up all loose ends after the program is finished.